

MEETING: 06/06/2013

ANNEX NUMBER: 7

ASSESSMENT CATEGORY - Older Londoners

Age UK Waltham Forest

Ref: 11638

Amount requested: £79,908

Adv: Karisia Gichuke

Base: Waltham Forest

Benefit: Waltham Forest

Amount Recommended: 70,000

Purpose of grant request: To significantly grow our local volunteer base with a particular focus on increasing independence, health, wellbeing and active ageing of those aged over 65 years.

Background

Age UK Waltham Forest (AUKWF) has been working in the borough for over 30 years. The organisation aims to improve the quality of life for older adults by campaigning for their rights and providing a wide variety of direct services. These include a generalist information and advice service, an innovative case-finding tool to identify older people at primary care level who are at risk of decline, and weekly visits to isolated older people. The organisation also provides training and assistance including digital clinics and computer courses, and exercise and balance classes.

Funding History

You have assisted AUKWF on two previous occasions, in April 2000, with a grant of £140,000 to provide training and access to information and communications technology, and in September 2006, with a grant of £108,000 to extend the use of IT to a wider cohort of people in Waltham Forest. Both grants were satisfactorily monitored.

Current Application

The current application is for AUKWF to grow its local volunteer base in order to increase the independence, health and wellbeing of those over 65 years through the creation of a Volunteer Coordinator post (22.5 hpw) to manage the project for two years, with the support of an Assistant (8 hpw). The project will recruit older people to tailored volunteer roles, providing a structured training programme in support of their activity. The participants will be integrated within existing AUKWF services and volunteering opportunities will be suitable to older people's needs, aspirations and physical restrictions.

Current services supported by volunteers include information and advice; visits to those who are housebound or terminally ill; beginner IT courses; knitting; and digital clinics to help with mobile phone use. The Volunteer Coordinator will be the central point of contact for volunteers, from recruitment through to overseeing activities and monitoring progress.

Involvement of older people in the management and running of services is integral to AUWF; however, to date the organisation has not had a funded volunteer organiser. The number of volunteers is currently increasing (from 70/80 to 120) and the organisation is now attempting to increase numbers and coordinate volunteer induction, training and management. AUWF has been successful in being accepted as part of a Department of Health pilot of the Slivers of Time web-based platform for volunteers to manage their own time, which will be integral to how data is collected and managed on this project.

Financial Observations

The audited accounts for the year ended 31 March 2012 show an overall deficit of £24,684 (4% of turnover), comprising a deficit of £25,870 on restricted funds partially offset by a surplus of £1,186 on unrestricted activity. The reserves policy states that the charity aims to hold in free unrestricted reserves between 2-3 months of general fund expenditure, which, based on current year expenditure, equates to between £62,100 and £93,150. At 31 March 2012 free unrestricted reserves stood at £226,005, equating to 6.7 months' worth of unrestricted expenditure.

Draft accounts for 2012/13 show a deficit of £32,908 which will be funded from unrestricted funds. Whilst this will reduce unrestricted free reserves to £193,097, this sum remains more than double the target range of £62,100 and £93,150.

The budget for 2013/14 shows a small deficit on unrestricted funds of £600. Total income of £402,600 is anticipated of which £317,000 has been secured at the time of writing.

Officer's Appraisal

AUWF is a long standing charity supporting isolated and vulnerable older people in Waltham Forest. The organisation's income has dropped from £780,000 in 2012 to a forecasted £400,000 in 2013. In 2011/12 it went through substantial review of services and restructure to become more efficient. However, the speed of change and short time available to transform the organisation at a time of recession leaves some services vulnerable. Given this situation, the additional reserves are a prudent caution at this time to alleviate any potential deficit in relation to grants as yet unsecured. However, in recognition that their reserves level is above their policy, it is recommended that the organisation contributes £5,000 each year towards this proposal.

Recommendation

£70,000 over two years (£35,000; £35,000) towards salary costs of the part time (22.5 hpw) Volunteer Coordinator, the Project Assistant (8hpw), and running costs of the volunteering project.



The City Bridge Trust

Charity Registration Number: 1035628

Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:
(office use only)

11638

Date Received:

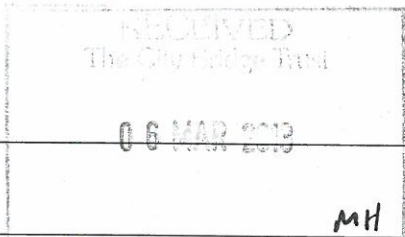
02/02/2013

Programme
Area:

05 06

1. About your organisation

Name of organisation applying for grant: Age UK Waltham Forest	
If the organisation is part of a larger organisation, what is its name? No	
Address for correspondence: Peterhouse Community Centre. 122 Forest Rise London	
Postcode: E17 3PW Is this your home address? No	
Contact person: Ms Sheena Dunbar	Position: Chief Executive
Phone: 020 8558 5512	Fax: 020 8558 0385
E-mail: s.dunbar@ageukwalthamforest.org.uk	
Website: http://www.ageukwalthamforest.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 1048212	
Date organisation established: 01/06/1982	



2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Older Londoners
Purpose for which funds are requested: (25 words maximum) To significantly grow our local volunteer base with a particular focus on increasing independence, health, wellbeing and active ageing of those aged over 65 years.
How much funding is requested? Year 1: £39,954 Year 2: £39,954 Year 3: £0 Total: £79,908

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3. Aims of your organisation

To improve later life for everyone in Waltham Forest through our work in which adults will:

- * have full access to the information, healthcare and social care they need
- * have opportunities to participate and contribute as volunteers, active citizens, good neighbours, family members and workers.
- * have the opportunity to live healthier longer lives and to enjoy a sense of wellbeing
- * have the opportunity to be equal citizens with equal rights
- * have enough money for a secure and decent life
- * access the services they need at a price they can afford
- * enjoy the benefits of longer life
- * be able to engage in joint planning and delivery of services for older people.

4. Main activities of your organisation

Digital Clinics
 Young volunteers training older people in using mobile phones.

Silver Surfers
 Delivered in partnership with WF libraries. Plus Silver Surfing at Home - a fee based pilot.

Wellbeing Programme
 A range of exercise classes - particular emphasis on retaining/improving individual's balance control. Funded by LBWF. Delivered across WF in partnership with local voluntary sector groups.

Home Support
 Fee based service which is expanding.

Just Connect
 Funded by Outer North East London NHS (ONEL NHS) to provide home visits to isolated/housebound older people.

Link Up
 Funded by ONEL NHS to provide home visits for terminally ill patients.

Crisis Prevention
 Funded by ONEL NHS delivered in conjunction with GP practices. Identifies those at greatest risk and through early contact minimise risk and prevent crisis.

Bowel Cancer Screening Awareness Raising. Funded by LBWF.

Warm Homes and Knitters
 Addressing fuel poverty and winter deaths. Provide warmth items for those on pension credit and Handiperson service in partnership with Home Energy Efficiency Team.

Information and Advice
 Streetlife Radio. Involving older people in delivery of programmes by older people for older people

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
1	28	7	120

6. How do you support your volunteers?

AUKWF provides a structured:

- *Induction Programme
- * Individual Training Plan including
 - work shadowing
 - on the job training
- *Clear Volunteer Role Descriptions
- * Service Manager - dedicated person
- * Quarterly volunteer meetings by Service Group

Thank you Events and Long Service Awards

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Leased	Leased to 2014, renewable



8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended - **Month: March**

Year: 2012

Income received from:	£
Voluntary income	266,041
Activities for generating funds	12,714
Investment income	1,143
Income from charitable activities	344,345
Other sources	777
Total Income	625,020

Expenditure:	£
Charitable activities	598,948
Governance costs	11,387
Cost of generating funds	39,369 33,805
Other	5,564
Total Expenditure:	649,704
(Deficit)/surplus for the year:	(24,684)

*Caroline
March*

Asset position at year end:	£
Fixed assets	9,092
Investments	2
Net current assets (liabilities)	233,990
Long-term liabilities	0
*Total A:	243,084

Reserves at year end:	£
Endowment funds	0
Restricted funds	7,985
Unrestricted funds	235,099
*Total B:	243,084

* Total A and Total B must be the same and should be taken from your balance sheet

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?
50%

10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

Local statutory funding has further reduced as LBWF is funding services for older people assessed as critical and substantial only and has largely withdrawn funding from preventative services. Age UK WF is seeing a rise in requests for help from older people and has used reserves to continue essential services while restructuring the organisation to meet the needs of older people within the changing environment.

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:

Month/Year:	01/08	Ref:	7408	Grant received:	£108,000	OR application rejected?	No
Month/Year:		Ref:		Grant received:		OR application rejected?	
Month/Year:		Ref:		Grant received:		OR application rejected?	

12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:
(i) City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)
(iv) Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2010	Year: 2011	Year: 2012
(i)			
(ii)	432,130	439,088	115,425
(iii)			
(iv)	185,610	154,273	150,000
(v)	0	0	44,272
(vi)			

13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2011	Year: 2012
Big Lottery		197,100
Lloyds TSB		15,400
Lloyds TSB	16,000	
Age UK	0	6,982
Robert McAlpine	5,000	0

14. What steps is your organisation taking to reduce its carbon footprint?

AUKWF's Environmental Policy commits us to:

- integrate consideration of environmental impacts into all our decision making and activities;
- promote environmental awareness among our partners and employees including training, educating and informing them about environmental issues that may affect their work
- reduce waste through re-use and recycling and by purchasing recycled, recyclable or re-furnished products and materials where these alternatives are available, economical and suitable
- contract with community waste recycling companies for disposal of paper and other waste;
- buy from sustainable sources and suppliers wherever possible;
- donate surplus items such as furniture and IT equipment to community schemes for re-use
- encourage the use of low-energy / low heat IT equipment' energy efficient lighting and refrigeration
- purchase and use environmentally responsible products accordingly
- review and monitor our environmental policy; carry out periodic audits of compliance and, when appropriate, introduce remedial measures

15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

Age UK Waltham Forest (AUKWF) is applying for funding to grow its local volunteer base focussing on increasing independence, health, wellbeing and active ageing of those over 65 years. This builds on our wide range of activities in this area, including an innovative assessment tool for a range of health/support needs. Our existing, key preventative services (as outlined in earlier question) keep older people independent in their own homes for longer, and support happier and healthier lives, avoiding more costly social or medical interventions.

The Need

Numbers of older people over the age of 65 years in Waltham Forest will increase from 23,800 (2015) to 29,400 (2030). This will mean more complex health and social care needs in the local community. Of those over 65:

- Over 50 % have a limiting long term illness,
- Self-care -- 8017 will be unable to manage at least one self-care activity (projected 2015)
- 4125 will have depression by 2025, increased from 3585
- Dementia will increase from 1680 people (2015) to 2135 in 2030
- Over one quarter are predicted to have a fall (projected 2015)
- 40% are living alone

Planned spend on older people in 2011/2012, was cut by 12.3%. Support is available to people aged 65+ assessed as critical or substantial. Many services that supported isolated older people and/or becoming frailer and in need of that 'little bit of support' have been decommissioned or reduced. Our expanded volunteer base will address this increasing need.

Volunteer Ageing Well Team

A Volunteer Coordinator 'Ageing Well' post and assistant will be recruited to manage this project using the DH funded Slivers of Time web-based platform for volunteer self-management. They will report directly to the Chief Executive. This team will design tailored volunteer roles suitable and attractive to older people, providing a full training and enablement programme. All volunteers will be trained to report any concerns and/or deteriorations/confusions/trips etc to the Volunteer Coordinator Ageing Well.

Outcomes & Impact include:

- Dissemination of other wellbeing information e.g. Winter Warmth, Health Screening
- Prevention of crisis
- Supports rehabilitation & maximises independent living
- Reduces isolation/ loneliness
- Increases access to local services

Outputs

100 new volunteers will be recruited in the first year.

There will be at least 500 Beneficiaries of a 'bit of help' per annum

Management Information

AUKWF will use Slivers of Time, C2 and Sage database for:

- Monthly management accounts.
- Quarterly reports City Bridge Trust
- Numbers Volunteers
- Numbers Contacts Beneficiaries
- Nature Contacts Beneficiaries
- Client Feedback
- Referrals following Visits e. g to other AUKWF services, to professionals in Health and Social Care
- Register of volunteers & clients including Name, Address, Date of Birth, Ethnicity, Disability, CRB checks, training records etc
- Details matching Volunteer to Service User

Older People -- Service Planning & Development

There will be quarterly (service -based) Volunteer meetings to support planning and development of our Ageing Well services. Plus access to Volunteer Events at least annually. Also access to biannual consultation events for older people in Waltham Forest.

AUKWF is a founder member of a local social enterprise - wfWellComm - a partnership of local organisations committed to improving wellbeing and enabling the most vulnerable to have a voice. Planning is underway to enable volunteers to also access opportunities with wfWellComm partners through Slivers of Time.

Strategic Fit

'... an emphasis on increasing volunteering' ... and in particular volunteers-involving wellbeing services.'

AUKWF Business Plan 2012-2013

Our Ageing Well proposed project builds on our existing health- based relationships as outlined in our full project proposal ✕

✕ on file



16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.

Monitoring
 Project Data - C2 database & Slivers of Time Volunteer Web Platform:

- Register volunteers & clients including Name, Address, DOB, Ethnicity, Disability , CRB check, training record, mini CV
- Details of matching Volunteer to Service User
- Number contacts and feedback
- Volunteer referrals if issues of concern
- Client Feedback Forms
- Random surveys by telephone after contact completion
- Meetings - Quarterly Volunteer Groups each service to which linked - Standard agenda item of 'Monitoring update'

Evaluation

- Personal evaluation health and welfare impacts- volunteers and beneficiaries using (scored) checklist well being/health outcomes e.g.
- Dissemination of other wellbeing information e.g. Winter Warmth
- Social isolation?
- Crisis Prevention?
- NB separately each service has detailed management information on benefits to beneficiaries and detailed measurements - reports available.
- Bi annual consultation events
- Age UK interim and final evaluation

17. Beneficiaries

How many people will benefit from the grant per year?
500

In which local authority is your organisation based?
Waltham Forest

Which borough(s) of Greater London will benefit from this grant?
 (if more than one, please give % for each)
Waltham Forest

At what address will the activity be located?
In recipient's homes or out in the community. The remaining activities would be undertaken at Age UK Waltham Forest's offices in Waltham Forest.

What age group will benefit? **Over 60, Adult**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British	60	Black - Caribbean	18
White - Irish	3	Black - African	2
White - Other (please describe)	2	Black - Other (please describe)	1
Asian - Indian	2	Black - British	1
Asian - Pakistani	4	Chinese	1
Asian - Bangladeshi	1		
Asian - Other (please describe)	2	Other (please describe)	
		Mixed	3
			Open to everyone

What proportion of the beneficiaries will be disabled people?
20%

18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Volunteer Coordinator Active Ageing, £25k @ 22.5 hrs NI @ 13.8%	16,072	16,072		32,144
Pension @ 7.5%	2,218	2,218		4,436
Project Assistant, £6,60 ph @ 8 hrs per week NI at 13.8%	1,205	1,205		2,410
Pension @ 7.5%	2,746	2,746		5,492
HR & finance	379	379		758
Office Accom, service office equip, It maint , database & support	206	206		412
Travel	2,496	2,496		4,992
Office Costs , postage, stationer, telephone, internet	6,000	6,000		12,000
Marketing & Promotion	800	800		1,600
Training	1,000	1,000		2,000
Accountancy & Audit	1,100	1,100		2,200
Governance, Recruitment, Man & Qual Ass	1,100	1,100		2,200
TOTAL	3,632	3,632		7,264
	39,954	39,954		79,908

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
TOTAL				

What other funders are currently considering the proposal?

Funder	£
TOTAL	

19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Volunteer Coordinator & Project Assistant Staffing costs see above for breakdown				
HR & finance	22,826	22,826		45,652
Office Accom, service office equip, It maint , database & support	2,496	2,496		4,992
Travel	6,000	6,000		12,000
Office Costs , postage, stationer, telephone, internet	800	800		1,600
Marketing & Promotion	1,000	1,000		2,000
Training	1,100	1,100		2,200
Accountancy & Audit	1,100	1,100		2,200
Governance, Recruitment, Man & Qual Ass	1,000	1,000		2,000
TOTAL	3,632	3,632		7,264
	39,954	39,954		79,908

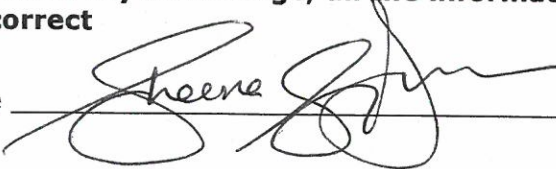
20. Funding requested from the Trust (continued)

When will the funding be required? 01/05/2013
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? Evaluation, particularly outcomes and projected savings to health and social care, will be used to seek funding for the activity from 2015. Additionally, during the life of the project consultation will be undertaken to determine whether fees can be introduced for some of the services on offer with consideration of income levels of the beneficiaries.
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? Not Applicable

Declaration on behalf of applicant organisation

I, Sheena S. Dunbar (your name)
am an authorised representative of
Age UK Waltham Forest (your organisation)
within which I am Chief Executive (your position)

To the best of my knowledge, all the information that I have provided in this application form is correct

Signature  Date 1/3/13

Return the completed form to: The City Bridge Trust
City of London
PO Box 270
Guildhall
London EC2P 2EJ

- Please
- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
 - **do send the information in the checklist** - if items are missing, your application will be returned to you
 - **do send only the information in the checklist** – if further information is required, we will contact you
 - **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
 - **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight